

approved

Senior Tax Credit Task Force

Minutes of the January 23, 2007, meeting

The Senior Tax Credit Task Force met on January 23, 2007, in the Tyson Room, Howard Building, 3430 Courthouse Dr., Ellicott City, MD, at 2 pm.

The following members of the task force were in attendance: Ted Meyerson, Colin Burke, Don Dunn, Frank Chase, Janice Bloodworth, Joel Yesley, Pat Dornan, Peter Rogers, Randy Nixon, Ron Weinstein, Sara Hamer, Sharon Greisz, Sherman Howell, Susan Buswell, Curt Curtis. Others from staff in attendance were Jeff Bronow, Leo Oken, Lynn Robeson, Theo Wimberly and Diana Coll.

The meeting was opened to the public and press.

Chairman Meyerson called the meeting to order at 2pm

The minutes from the January 18, 2007 meeting were unanimously approved by the task force.

The Chairman announced that a sign-up sheet for the Senior Center visits scheduled for Jan. 30th was being circulated. It was suggested that, if needed, time limits should be used for visits.

The Chairman also announced that the Public Hearing was scheduled for Jan. 30th at 7pm.

For informational purposes, Sharon Greisz (Department of Finance), opened the discussion with an explanation of a handout that was distributed which computed the Senior Tax Credit based on the average applicant to the Tax Deferral program.

The Chair also announced that there will not be any voting on the issues for the next two meetings. The discussions are informational.

The Chairman then moved the discussion to item #3 on the Agenda: Should the income test be changed from the current \$75,000 threshold? After much discussion three themes emerged:

1. \$75,000 is the appropriate threshold to use, because many Seniors are on fixed incomes, their taxes continue to rise, and the County financial situation is fairly strong. Therefore, the threshold should be set to assist a wider range of Seniors.
2. Approximately \$45,000 is the appropriate threshold because the Task force's purpose statement specifically said that the credit was intended for Seniors who are least able to afford an increase in property taxes. If the threshold is set too high, then it may have a negative impact on the County's financial situation.
3. The threshold should fall between \$45,000 and \$75,000. This threshold level was offered as a compromise suggestion.

The discussion then moved into Agenda item #5 Should the credit be progressive? The following points were made: 1. A progressive tax may be more responsible, and 2) a non-progressive tax may be simpler to administer.

Bronow (Department of Planning) announced that he was working on a computer model that would compare the different tax programs offered to Seniors.

The Chairman then moved the discussion to agenda item #4 Should there be an asset test? Greisz (Department of Finance) said that the County typically requires a signed statement and tax statements as verification of an income test. She also stated that homes and associated curtilage and retirement accounts are typically excluded from asset tests.

Action Items for January 25th:

- Income calculation forms - Greisz
- Definition of Income - Greisz
- Computer model comparing the different tax programs offered to Seniors - Bronow, Greisz, Weinstein
-

The task force adjourned at 3:45 pm.

Respectfully submitted,

Theodore Wimberly